



Virginia Information Technologies Agency



Commonwealth Project Management (CPM) & Oversight

**Presented to the Commonwealth IT Investment Board
IT Solutions Committee
April 5, 2006**

Dan Ziomek
Associate Director, PMD

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Agenda

- CPM Related Policies, Standards, & Guidelines**
- Commonwealth ITIM Framework**
- CPM Definitions, Attributes, & Focus**
- CPM Standard and Guideline**
- CPM Lifecycle Phases**
- CPM Oversight**
- CPM Planning & Development Approval**
- CPM Major IT Project Dashboard**
- Project Manager Development**



Project Management Policies, Standards, & Guidelines

Technology Management Policy
COV ITRM Policy GOV 2002-02.1
Published March 2004

Project Manager Selection
and Training Standard
COV ITRM Standard
GOV 2003-02.3
Published September 2003

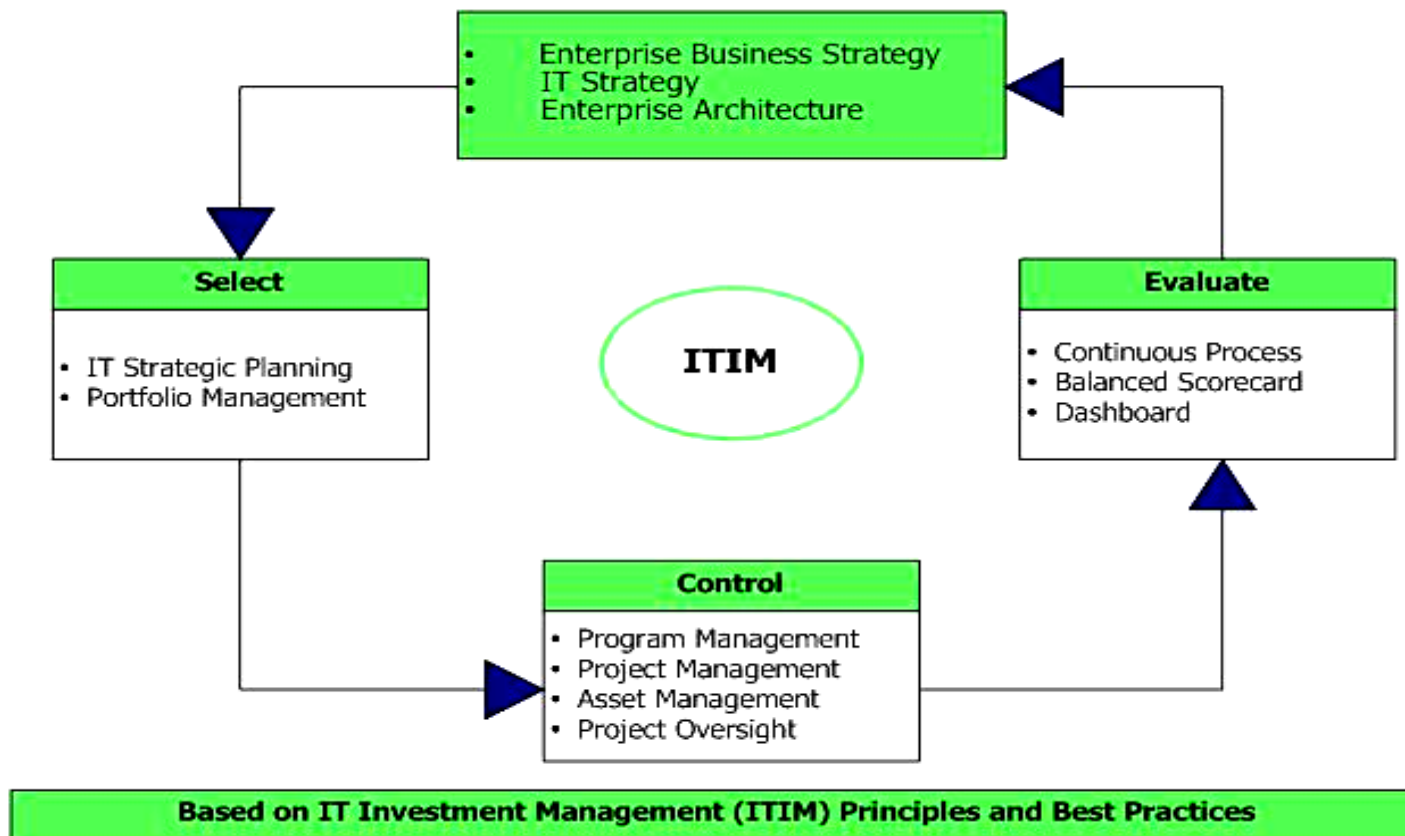
Technology Management
Glossary
COV ITRM Standard
GOV 109-2
Revision Published July 2005

Project Management Standard
COV ITRM Standard
GOV 2004-02.3.2
October 2004
(Revision Pending ITIB
Approval - April 5, 2006)

IT Investment
Management
Standard
(In Development – June 2006)

Project Management Guideline
COV ITRM Guideline GOV 2003-02.2
Published April 2003
(In Revision – 2006)

Commonwealth IT Investment Management Framework





Commonwealth Project Management (CPM) Defined

CPM is the application of knowledge, skills, tools, and techniques, to meet or exceed stakeholder needs and expectations from a Commonwealth Project.

The objective of CPM is to establish a structured, disciplined approach for project management in order to deliver value from business-driven IT investments.



CPM Attributes

Value and outcomes driven

Customer service focused

Stakeholder involvement

Transparency

Best Practices



CPM – Focus on Major Projects

Major IT Project –

In the Commonwealth of Virginia, a Major IT Project is defined as any state agency information technology project that (i) is mission critical, (ii) has statewide application, or (iii) has a total estimated cost of more than \$1 million.



CPM – Focus on Project Baselines

- Scope
- Performance
- Cost
- Schedule
- Risk



CPM Standard & Guideline Establishing a Common Language...

Project Complexity Drives Project Management Information Requirements:

- Selected templates, like the Project Proposal, CBA, Risk Assessment, and Closeout Report are required.
- Other **templates are optional**
- Required **information is not** optional
- The greater the project complexity the greater the management information required

<http://www.vita.virginia.gov/projects/cpm/templates.cfm> -



Project Complexity Calculator

Project Complexity Calculator - Scoring Matrix

| Question | Response 1 | Score | Response 2 | Score | Response 3 | Score | Response 4 | Score |
|---|---------------------|-------|---------------------------------|-------|-----------------------------------|-------|--------------------------|-------|
| What is the total project cost? | Less than \$100,000 | 10 | Between \$100,000 and \$500,000 | 20 | Between \$500,000 and \$1,000,000 | 30 | Greater than \$1 Million | 40 |
| What is the estimated total cost for hardware? | Less than \$100,000 | 2 | Between \$100,000 and \$500,000 | 4 | Between \$500,000 and \$1,000,000 | 6 | Greater than \$1 Million | 8 |
| What is the estimated total cost for software? | Less than \$100,000 | 2 | Between \$100,000 and \$500,000 | 4 | Between \$500,000 and \$1,000,000 | 6 | Greater than \$1 Million | 8 |
| What is the estimated cost of application development or software configuration services? | Less than \$100,000 | 2 | Between \$100,000 and \$500,000 | 4 | Between \$500,000 and \$1,000,000 | 6 | Greater than \$1 Million | 8 |

Commonwealth Technology Management Policy

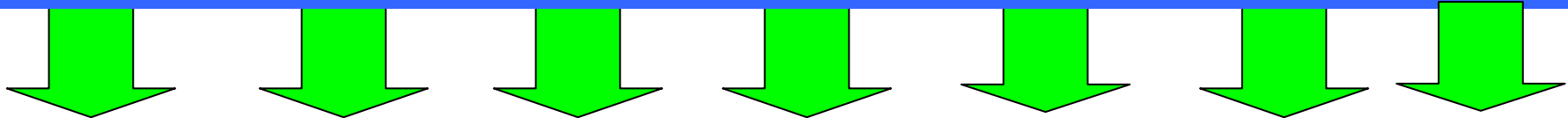
Major IT Project Life-Cycle

| Life-cycle Phase | Selection | Initiation | Planning | Execution & Control | Closeout | Operations & Support |
|------------------------------------|--|---|--|---|---|---|
| Decision Points | Selection Approved | Initiation Approved | Baseline Approved | Implementation Approved | Closeout Approved | End of Project |
| Process Roles and Responsibilities | | | | | | |
| IT Investment Board (ITIB) | | Approve Project Initiation (Code of Virginia – Development Approval) | May Terminate Project | May Terminate Project | | |
| Chief Information Officer (CIO) | Approve Agency IT Strategic Plan (Code of Virginia - Planning Approval) | Recommend Project Initiation to ITIB | - Resolve Issues as Required - Modify, Suspend or Recommend Termination | - Monitor Project Progress - Approve Project Status Reports - Modify, Suspend, or Recommend Termination | Approve Project Closeout | |
| Project Management Division | Recommend Approval of IT Strategic Plan to CIO | Recommend Project Initiation to CIO | Assist & Support Project Detailed Planning | - Review Project Progress - Assist & Support Project Development | - Complete Final Project Evaluation | - Review Post Implementation Report |
| Proponent Secretariat | Review Agency IT Strategic Plan | Recommend Project Initiation | Resolve Issues as Requested by Agency and CIO | - Evaluate Project Status Reports - Resolve Issues as Requested by Agency and CIO | Review Project Closeout Report | |
| Agency | Select Project in Agency IT Strategic Plan Start | Submit Project Proposal & Charter | Submit Detailed Project Plan | - Submit Project Status Reports - Evaluate Overall Project Progress | - Submit Project Closeout Documentation | - Conduct Post Implementation Review - Submit Post Implementation Report |

Process flows bottom to top, left to right.

Commonwealth Project Oversight

Code of Virginia
Commonwealth Technology Management (CTM) Policy and
Supporting CTM Standards and Guidelines
Best Practices



Selection

Initiation

Detailed
Planning

Execution
&
Control

Closeout

CIO
Planning
Approval & ITIB
RTIP Report to
Governor and GA

PMD &
Secretariat
Development
Approval
Recommendation

CIO
Development
Approval
Recommendation
to ITIB

ITIB
Development
Approval

Major IT
Project
Dashboard
Baselines

Dashboard
& Oversight
Committees

Dashboard
& Oversight
Committees

IV&V and
Periodic Reporting to the ITIB



Project Planning Approval (Code of Virginia § 2.2-2018)

Projects are approved based on the:

- degree to which the project is consistent with the Commonwealth's overall strategic plan,
- technical feasibility of the project (if known),
- benefits to the Commonwealth of the project, including customer service improvements,
- risks associated with the project,
- continued funding requirements, and
- past performance by the agency on other projects

...as evidenced in an Agency Preliminary Business Case
...evaluated against ITIB Selection & Ranking Criteria.



Project Development Approval Balanced Scorecard

| Criteria | Score | Comment |
|--|-------|---------|
| <u>Stakeholder Perspective</u> | G | |
| 1. To what degree does the proposed investment result in significant tangible and intangible benefits for stakeholders? | G | |
| 2. To what degree does the proposed investment target stakeholders that have been chronically underserved by information technology investments? | G | |
| 3. To what degree does the proposed investment increase public protection, health, education, environment, or safety? | G | |
| 4. To what degree does the proposed investment anticipate improvements to internal and external customer service delivery (e.g., faster response, greater access to information, elimination or reduction in client complaints)? | G | |
| 5. To what degree does the proposed investment increase citizen access to government services? | G | |



Project Development Approval Balanced Scorecard

Categories Evaluated:

- Stakeholder Perspective
- Business Process Perspective
- Project Management Perspective
- Financial & Economic Perspective
- Enterprise (Commonwealth) Portfolio Perspective

...using a Modified Delphi Evaluation approach

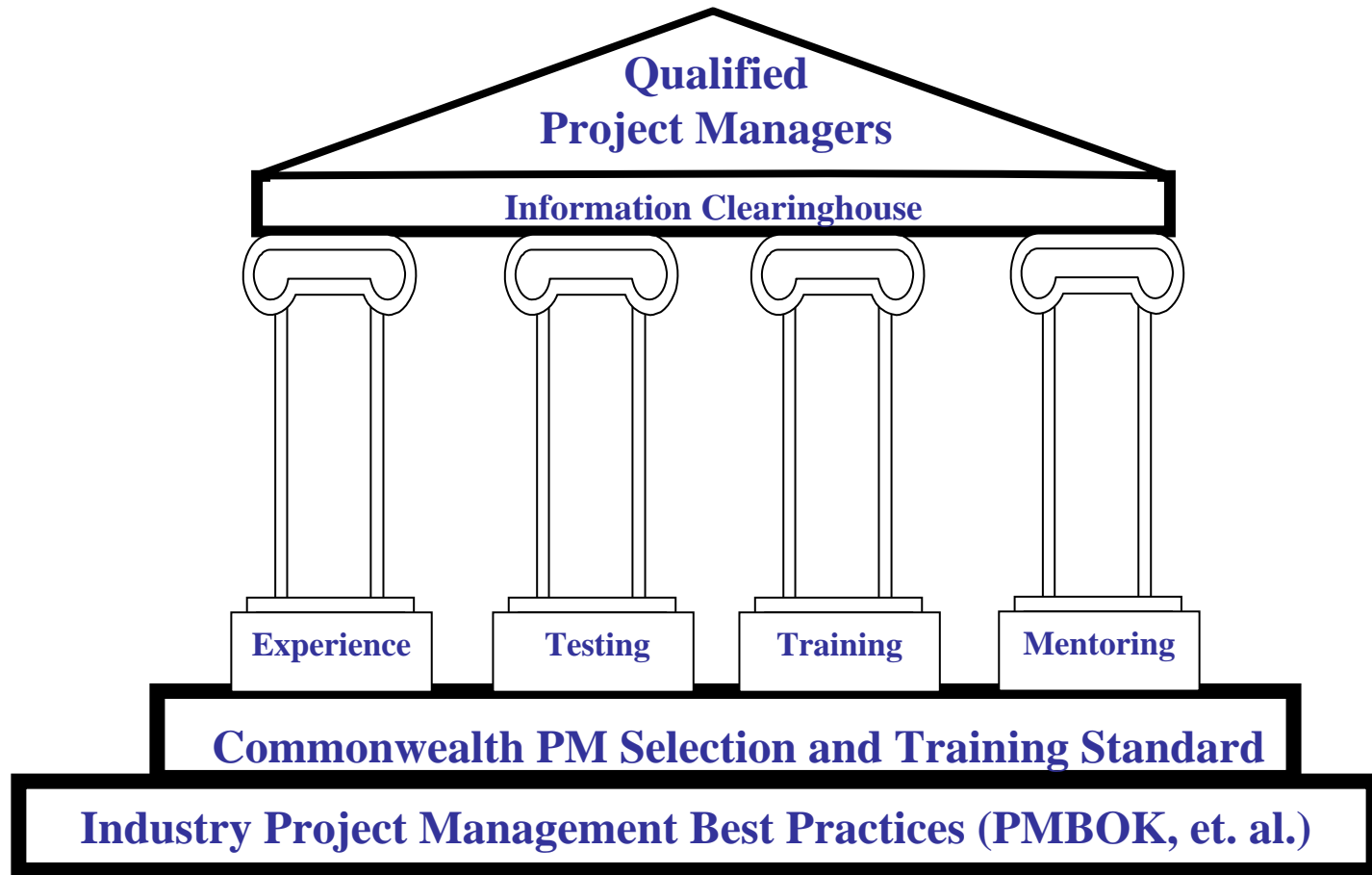


Major IT Project Status Report Dashboard

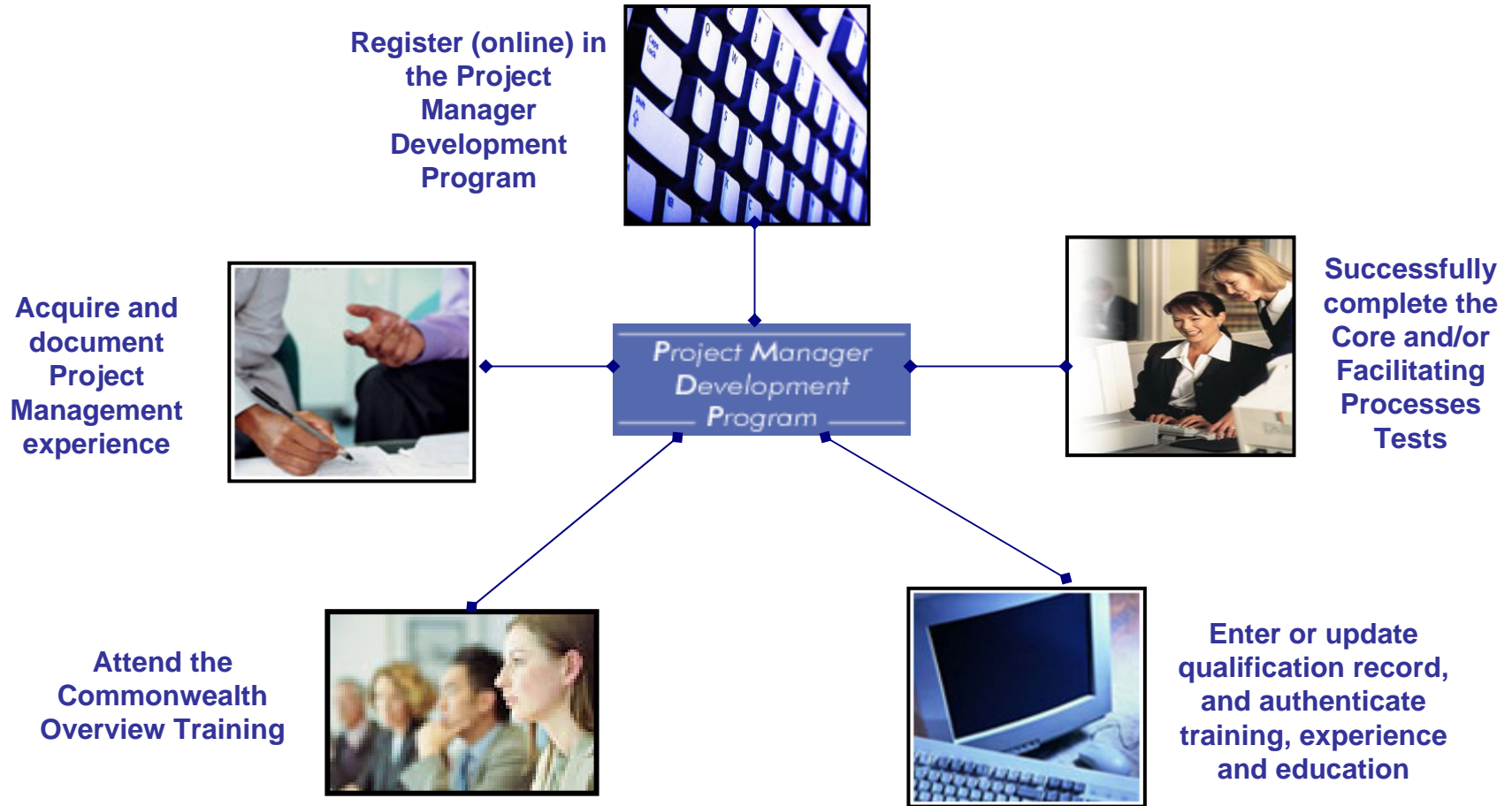
- Web-based, self-reporting system
- Provides concise summary & status of major IT projects.
- Establishes a consistent, common framework for agency, Secretariat, CIO, and ITIB update or review of project baseline activity (scope, performance, cost, schedule, risk)
- Enhances ability to respond to project changes in a timely manner
- Increases accountability
- Improves project management & oversight communication
- Provides transparency - public view on VITA Web site

<http://apps.vita.virginia.gov/Dashboard/> -

Project Manager Development



Project Manager Development Program





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Supporting Slides

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Definition of a Policy

Policies are general statements of direction and purpose designed to promote the coordinated planning, practical acquisition, effective development, and efficient use of information technology resources.



Definition of a Standard

Standards are specific and, where applicable, technical documents containing directives and mandatory specifications governing the management, development, and use of information technology resources.



Definition of a Guideline

Guidelines are directives and specifications, similar to standards but advisory in nature. In essence, guidelines constitute recommendations which are not binding on agencies and institutions of higher education.



Project Complexity Defined

Project Complexity Classification

High Complexity - Projects that are typically high dollar value projects, requiring extensive integration, and stringent control systems. The nature of high complexity projects drives the requirement for extensive planning, documentation, and strictly enforced change and configuration management processes needed to deliver the products or services as specified in the project scope.

Medium Complexity - Projects that are typically lower dollar value projects, requiring significant integration, but less stringent control systems than highly complex projects. The nature of medium complexity projects drives the requirement for thorough planning, but less documentation and the control systems needed to deliver the project product or services as specified in the project scope.

Low Complexity – Projects that are typically low dollar value projects, requiring little integration and minimal controls. The nature of low complexity projects drives the requirement for complete planning, but minimizes documentation and the control systems needed to deliver the project product or services as specified in the project scope

Typically does not equal always !



Commonwealth Major IT Project Status Report Dashboard



Public View

Project List

Timespan: December 2003 - February 2004

Education

| Agency | Project Formal Title | Back | December 2003* | January 2004* | February 2004* | Forward |
|--------------------------------|---|----------------------|----------------|---------------|----------------|---------|
| Christopher Newport University | Web Accessible Integrated System | Back | ↑ | ↑ | ↑ | Forward |
| Department of Education | Education Information Management System | Back | NR | NR | NR | Forward |
| Department of Education | Web Based SOL Technology Initiative | Back | ↑ | ↑ | ↑ | Forward |
| George Mason University | Patriot Project - Banner Student Implementation | Back | ↑ | ↑ | ↑ | Forward |
| Radford University | Upgrade Administrative Computer Systems | Back | ↑ | ↑ | ↑ | Forward |
| Richard Bland College | Enterprise Resource Management System | Back | ↑ | ↑ | ↑ | Forward |
| The College of William & Mary | Mastering Administrative Systems & Technologies | Back | ↑ | ↑ | ↑ | Forward |
| University of Virginia | Oracle 11i Upgrade | Back | ↑ | ↑ | ↑ | Forward |

Finance

| Agency | Project Formal Title | Back | December 2003* | January 2004* | February 2004* | Forward |
|------------------------|-------------------------------------|----------------------|----------------|---------------|----------------|---------|
| Department of Taxation | Partnership Project | Back | ↑ | ↑ | ↑ | Forward |